

Tuesday Tips and Tidbits: Building Better Reports in Audit Manager



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Presenters



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Agenda



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| 02 | How to Build Custom Extracts |
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01

Custom Extract Reports Overview

What Are Custom Extract Reports

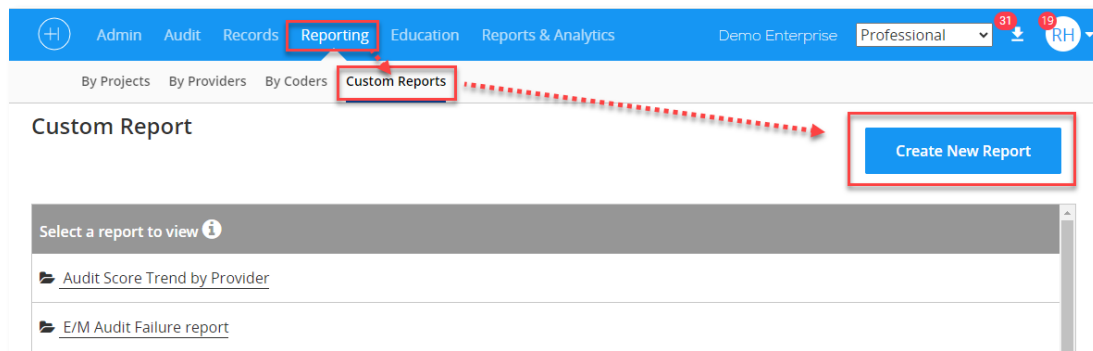


Custom Extracts

The custom extract builder can be a great solution when standard out-of-box reports don't track and/or trend the data you need, or you want more granular detail.

With the custom extract builder, users choose the needed data elements to export to spreadsheet (*i.e. chart comments, date education completed, financial impact at the code line-level*) with other identifying data (*provider, patient, DOS, etc.*) enabling users to manipulate the data extract to meet their end reporting goals.

Located under *Reporting* tab > *Custom Reports* > *Click Create New Report* button



NOTE: Although these reports can export data not available through any other Standard Reports, custom extracts only provide raw data from the system. They do not have calculations, sums, or accuracy rates. Users must manipulate the data to get end results.

What Are Custom Extract Reports



Custom Extract Examples

- Data elements from audits can be extracted, for example reported/audited codes, financial values per code, code scoring
- Chart level comments for error reporting.
- Custom field entries can be extracted
 - Yes & No's from checklist entered as custom fields
 - Auditor completion dates (if QA reviewer is holding audits)
 - Coder values if wanting to audit provider and coder for same chart
 - Auditor QA results that have been entered into custom fields
- Internal Notes to track and/or trend completion dates not natively tracked in Audit Manager or to track QA comments.
- Determining whether your team using the Override feature?

Patient Name	Date of Service	Auditor	Completed Date	Reported CPT	Value of Reported Total \$	Audited CPT	Value of Audited Total \$	Variance of \$
Fleetwood, Tammy	2/21/2015	Jane Doe	3/26/2024	99214	\$78.60	99214	\$78.60	\$0.00
Fleetwood, Tammy	2/21/2015	Jane						
Smith, William	3/5/2015	Jane						

Patient ID	annual safety report (yes= 1, no= 0)	structure and content of investigator file (yes= 1, no= 0)	accounting of research funds (yes= 1, no= 0)	accurate inventory count (yes= 1, no= 0)
7456	1	1	1	0
6789	0	1	1	1
3456				
8236				

Date of Service	Patient, Name	Chart Level Comments - Short Description	Chart Level Comments - Long Description
1/28/2019	White, Emily	HCC - Indication	Medical record documentation of test na
1/2/2019	Evans, Will	Modifier - Add	Medical record documentation supports
1/10/2019	Carlton Cannon	ICD - Supports	Medical record documentation supports
1/28/2019	White, Sarah	Cloned	The [fill in ROS, Exam, A/P] appears to be
1/28/2019	White, Sarah	Signature - none	The medical record does not appear to be
4/1/2018	Hancock, Henry	EM Not Supported	Medical record documentation does not
4/1/2018	Hancock, Henry	Not Supported - HPI	Medical record documentation includes t
5/2/2018	Tubby, Tommy	Not Supported - HPI	Medical record documentation includes t
4/1/2018	Tubby, Tommy	Cloned	The ROS appears to be cloned document
4/1/2018	Smith, John	Not Supported - HPI	Medical record documentation includes t
4/1/2018	Smith, John	Rendering provider	The rendering provider reflected on the



02

How to Build Custom Extracts

How To Build Custom Extracts



Step 1: Go to Reporting tab > Custom Reports > Click Create New Report button

Step 2: Select Fields to Include

The reportable fields are grouped into Categories. Select the category and then scroll down through the fields, checking the box next to the fields to include. Click continue.

Step 3: Re-order fields

Drag & Drop fields to re-order columns in the report. Click continue.

Step 4: Name & Save Report

Save & Run Report or Save to return and run later.

Step 5: Re-use report for regular reporting

The screenshot illustrates the steps for creating a custom report. The top navigation bar includes 'Admin', 'Audit', 'Records', 'Reporting', 'Education', 'Reports & Analytics', 'Demo Enterprise', 'Professional', and user information. The 'Reporting' tab is active, and the 'Custom Reports' sub-tab is selected. A 'Create New Report' button is highlighted in the top right corner. Below this, a 'Select a report to view' section lists 'Audit Score Trend by Provider' and 'E/M Audit Failure report'. A modal window titled 'New Custom Report: Select Fields to Include' is open, showing a list of categories and fields to include. The 'Miscellaneous' category is selected, and 'Chart Level Comments - Short Description' and 'Chart Level Comments - Long Description' are checked. A second modal window titled 'New Custom Report: Confirm Order' is open, showing a table of fields to be included in the report.

#	Field Name	
1	Provider Last Name	John
2	Provider First Name	Doctor Family Practice
3	Practice	Family Medicine
4	Provider Specialty	Jane Doe
5	Patient Name	123456
6	Patient ID	
7		

How To Build Custom Extracts



Recommendation:

Click through each category and scroll down through all the fields – get acquainted with what's available, you might need it later. Create test reports to view the data pulled if you aren't sure what a kind of data the field will pull into the report.

The image displays four screenshots of the 'Fields to Include in Report' configuration interface, showing different categories and their associated fields.

- Statistics (3):** Fields include Value of Audited wRVU, Difference of wRVU, Value of Reported Total RVU, Value of Audited Total RVU, Difference of Total RVU, Value of Reported Total \$, Value of Audited Total \$, and Variance of \$.
- Patient Data (6):** Fields include Patient Name, DOB, Gender, Patient ID, POS, RVU POS, and POS Correct.
- ICD/EM/CPT/HCPCS Codes (6):** Fields include Reported CPT, Reported Modifier, Reported unit, Reported CPT Description, Reported Mapping, Audited CPT, Audited Modifier, and Audited unit.
- Miscellaneous (3):** Fields include Internal Notes, Missing Data, Chart Level Comments - Main Category, Chart Level Comments - Sub Category, Chart Level Comments - Short Description, and Chart Level Comments - Long Description.



03

Pulling Custom Extract Report Tips



Pulling Custom Extract Report Tips



Use filters to drill into desired data sets

- **Date Type:** Switch to Completed Date to pull data from finalized audits. Select Project Start or Due to include both in-progress or completed data
- **From Date & To Date:** Default date range is only last 30 days. Expand 'From Date' to include all findings for the desired date range
- **Provider or Coder:** Select specific providers or coders to drill into data specific to individuals.
- **Practice or Coder Organization:** Select practice(s) or coder organization(s) to filter results for individuals assigned to those entities – even if multiple practices/orgs were audited in the same project.
- **Specialty:** Filter results by specialty (note: All providers or coders must be selected first for the specialties for those individuals to display.
- **Audit Project:** Pick and choose which projects to include in the data.
- **Note:** If nothing is selected within a filter, all values are 'selected' by default. Although, other filtering may override the "all default"

Chart Level Findings Report

Date Type: **Completed Date** (dropdown menu open showing: Project Start Date, Project Due Date, Completed Date)

From Date: 01-01-2022 To Date: 10-24-2022

Practice: Select Coder Organization: Select

Provider: Select Coder: Select

Specialty: Select

Report Customization

Custom Title Custom Title

Client Project

Confidentiality Statement

Audit Project: 2022 OIG Specialty Project, 2... (dropdown menu open showing: 2022, Select All, 2022 Annual Coder Audits, 2022 OIG Specialty Project, 2022 Urology Audits)

Cancel Download Report

Refund/Rebill Report

Date Type: **Project Start Date**

From Date: 06-29-2024 To Date: 07-29-2024

Client: Demo Enterprise Practice: Select Coder Organization: Select

Provider: Select Coder: Select Audit Project: Select

Specialty: Select

Pulling Custom Extract Report Tips



Report Customization

Bottom section creates a title with additional information to display at top of the spreadsheet (Project(s), Report run Date, confidentiality statement)

Refund/Rebill Report

Date Type:

Project Start Date: From Date: To Date:

Client: Practice: Coder Organization:

Provider: Coder: Audit Project:

Specialty:

Report Customization

Custom Title

Client Project Report Run Date

Confidentiality Statement

February 2024 Refund/Rebill Report											CONFIDENTIAL MATERIAL	
Results For Project - 2023 Annual Provider Audit, 2024 Cardiology Audit, 2022 Anesthesiology Audits											This information, prepared pursuant to the Agreement and is solely for the use and benefit of Demo Enterprise and is not intended for use or reliance by any other person or entity.	
Report Run Date - 07-29-2024 05:22:01 PM (MDT)												
Project	Practice	Provider Last Name	Provider First Name	Auditor	Patient Name	Patient ID	Date of Service	Reported CPT	Audited CPT	Value of Reported Total \$	Value of Audited Total \$	Variance of \$
2023 Annual Provider Audit	AAPC	Burns	Mike	Prince, Jack	Fleetwood, Tammy	1	2/21/2015	99214	99214	\$78.60	\$78.60	\$0.00



04

**Error (Chart Level Comment)
Extract Report**

Error (Chart Comment) Extract Report



Pre-work: Customize Chart Level Comment Short Descriptions

Short descriptions are perfect for pivot table analysis – giving an accurate count of specific errors.

To enhance the data value, update the short description of each chart comment to represent the error.

For example, *“Medical record documentation does not appear to support xxx.xx [list why]”* has a very generic short description *“Not Supported”*. A better summary is *“Dx – Not Supported”*

**Create code specific comments too!

The screenshot shows the 'Manage Audit Settings' page with the 'Chart Level Comments' tab selected. The table below shows the current state of chart level comments.

Category	Subcategory	Short Description	Long Description		
<input type="checkbox"/>	Diagnosis	Not Supported	GERD	Medical record does not support ICD K21.9 GERD	✓ ✎ ✕
<input type="checkbox"/>	Diagnosis	Not Supported	Not Supported	Medical record documentation does not appear to support xxx.xx [list why].	✎ ✕

This close-up shows a row from the table where the short description has been updated to be more specific.

Category	Subcategory	Short Description	Long Description		
<input type="checkbox"/>	Diagnosis	ICD-10 Not Supported	Dx - Not Supported	Medical record documentation does not appear to support xxx.xx [list why].	

This close-up shows a row from the table where the short description has been updated to be more specific for modifiers.

Category	Subcategory	Short Description	Long Description		
<input type="checkbox"/>	Modifiers	Add	Add	Medical record documentation supports adding modifier xx [list why].	
<input type="checkbox"/>	Modifiers	Add	QK modifier	Medical record documentation supports adding modifier QK not AA because the case was medically directed, not personally performed.	

Error (Chart Comment) Extract Report



- Create a custom chart level comment report: Reports > Custom Reports > Create New Report
- Select the fields to include in the CLC report
 - Provider/coder Data: Provider Last & First Name, Practice, Specialty
 - Patient Data: Patient Name, Patient ID, DOS
 - Miscellaneous: Chart Level Comments – Short Description & Long Description
- Drag & Drop fields to re-order columns in the report.
- Name Report > Save & Run Report

The first screenshot shows the 'Reporting' menu with 'Custom Reports' highlighted. A red box highlights the 'Create New Report' button.

The second screenshot shows the 'New Custom Report: Select Fields to Include' dialog. The 'Miscellaneous' category is selected, and 'Chart Level Comments - Short Description' and 'Chart Level Comments - Long Description' are checked under 'Fields to Include in Report'.

The third screenshot shows the 'New Custom Report: Confirm Order of Fields' dialog. It displays a list of fields and their sample values:

#	Field Name	Sample
2	Provider Last Name	Doctor
3	Provider First Name	John
4	Practice	Doctor Family Practice
5	Provider Specialty	Family Medicine
6	Patient Name	Jane Doe
7	Patient ID	123456

Error (Chart Comment) Extract Report



Why are some Short Description Blank?

It depends upon how the comments were added to the audit.

Chart Level Findings are added FOUR ways:

1. Any "no" selected in procedure checklist – **No short description**
2. Any boxed check in Documentation Elements – **No short description**
3. Hand-keyed chart level comments – **No short description**
4. Chart Level Comment Marcos – **Includes Short Description**

**Add short descriptions where missing.
Use filters for efficiency

B	C	D	E	F	G
Provider Last Name	Provider First Name	Date of Service	Patient Name	Chart Level Comments - Short Description	Chart Level Comments - Long Description
Johnson	John	1/28/2019	White, Sarah	Cloned	The [fill in ROS, Exam, A/P] appears to be cloned documentation, not specific to the patient's presenting problem(s).
Johnson	John	1/28/2019	White, Sarah	Signature - none	The medical record does not appear to be signed. This service may not be billable. xyz.....stay here...
Bates	Garrett	10/11/2018	Test Patient 1		Medical record documentation does not appear to include the Verbal order signed for EKG.
Bates	Garrett	10/11/2018	Test Patient 1		Rendering and billing providers do not match.
Billy	Goat	2/6/2019	Anesthesia - Dr Spock		Medical record documentation does not appear to include the Site for Injection / Immunization.
Burns	Mike	10/22/2018	Test Patient 2	Modifier - Add	Medical record documentation supports adding modifier 25, to indicate a significant and separately identifiable E/M service.
Calvert	Theresa	10/29/2018	Test Patient 3	ICD - Supports	Medical record documentation supports ICD-CM code(s) as reported.
Calvert	Theresa	10/29/2018	Test Patient 3		Rendering and billing providers do not match.
Brady	Tom	2/4/2019	Test, test		Medical record documentation does not appear to include the Verbal order signed for EKG.
Jordan	Julie	4/1/2018	Test Patient One	EM Not Supported	

Procedures

EKG Injection / Immunization Lab Radiology Ophthalmology Intermediate Eye Exam

AWV - Medicare Beneficiary **Telehealth Audio & Visual Initial Preventative Physician Exam (IPPE)

Psychotherapy Preventative Medicine Service Initial Diagnostic Psychiatric Evaluation

Initial Diagnostic Psychiatric Evaluation with Medical Evaluation Pelvic and Clinical Breast Exam

Ophthalmology Comprehensive Eye Exam **2022 Research Audit Checklist SNF Checklist

Order / Indication Yes No N/A

Signed tracing Yes No N/A

Verbal order signed Yes No N/A

Comparison documented when available for Medicare Yes No N/A

Interpretation sheet Yes No N/A

Mark all others N/A

Documentation Elements

No Issues:

Date of service does not match billed date of service.

Scribe and/or provider attestation is not valid / present

Handwritten notes are not legible

Incident To does not appear to meet guidelines

Medical record appears to have cloned elements

Chart Level Comments

Medical record documentation does not appear to include the Signed tracing, Interpretation sheet for EKG. ✕

Medical record documentation of [test name] from [date] indicates patient has [xxx]. Auditor recommends further review by physician for possible diagnosis and/or the need for further evaluation. ✕

Medical record documentation supports a code level higher than the reported code. Patient presents with [a low acuity problem, limited data, and low risk of complication/morbidity/mortality] which supports an overall low MDM level. ✕

View: All

Show / Hide Add Reset Search:

Category	Subcategory	Detail	Select	Comment
Diagnosis	Add	HCC - Continue T...	<input type="checkbox"/>	Medical record documentation supports adding xxx. Documentation indicates the patient's condition is [stable, controlled, unchanged] and to continue current treatment.
Diagnosis	Add	HCC - Referral	<input type="checkbox"/>	Medical record documentation supports adding xxx. Documentation indicates patient was referred to another provider for further evaluation.
Diagnosis	Add	HCC - Tests rev/ord	<input type="checkbox"/>	Medical record documentation supports adding xxx. Documentation indicates diagnostic services were reviewed/ordered during today's visit.
Diagnosis	Add	HCC - Indication	<input checked="" type="checkbox"/>	Medical record documentation of [test name] from [date] indicates patient has [xxx]. Auditor recommends further review by physician for possible diagnosis and/or the need for further evaluation.
Diagnosis	Not Supported	HCC - Acute Dx	<input type="checkbox"/>	Medical record documentation does not support xxx. This is an acute condition which can only be treated in the hospital setting. Report xxx instead.

Error (Chart Comment) Extract Report



- After all short descriptions are filled in > Go to Insert Tab > Insert Pivot Table > From Table/Range > New Worksheet radio button > OK
- On the pivot table tab > drag CLC-Short Description to Row box > drag Date of Service to Values box.

The screenshot illustrates the steps to create a PivotTable in Excel. The 'Insert' tab is selected, and the 'PivotTable' button is highlighted. The 'From Table/Range' option is chosen from the dropdown menu. The 'PivotTable from table or range' dialog box is open, showing the source range as 'CLC Report!\$A\$1:\$G\$84' and the 'New Worksheet' radio button selected. The background shows a PivotTable with 'Row Labels' and 'Count of Date of Service'. The 'PivotTable Fields' task pane is also visible, showing 'Chart Level Comments - Short Description' in the Rows area and 'Count of Date of Service' in the Values area.

Row Labels	Count of Date of Service
HCC - Indication	3
Not Supported - HPI	3
Cloned	3
EM Not Supported	2
ICD - Supports	2
HCC - HX of	2
HCC - Acute Dx	2
Modifier - Add	1
HCPCS Supports	1
CPT Not Supported	1
Signature - none	1
HCC - Continue Tx	1
Rendering provider	1
HCC - Chronic Dx	1
HCC - Referral	1
HCC - Status Post	1
HCC - Not Supported	1
HCC - Not Doc	1
Grand Total	28



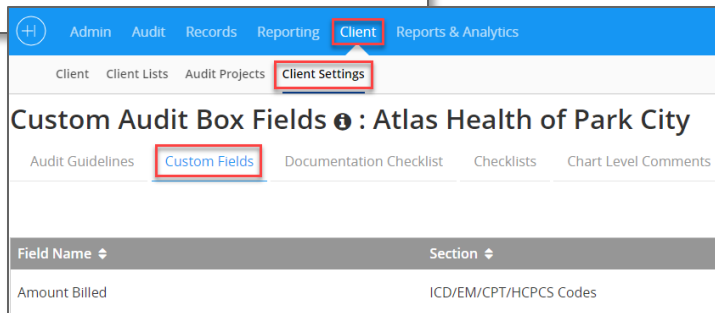
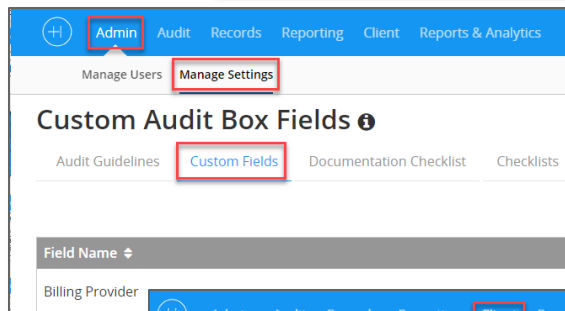
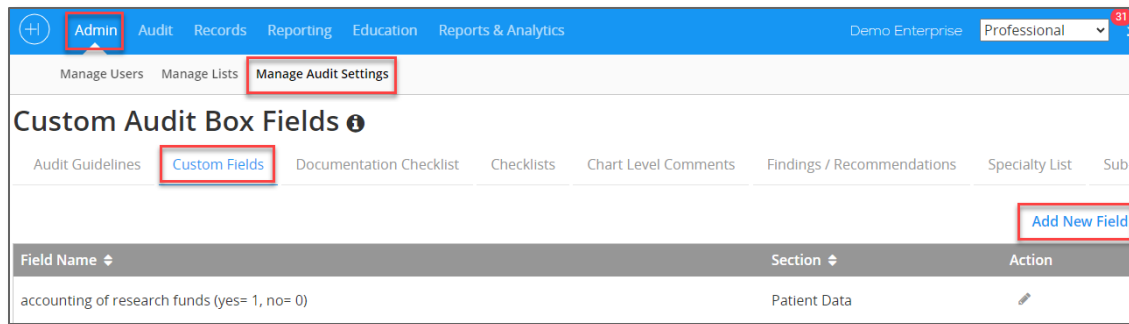
05

Checklist Results Extract Report

Checklist Results Extract Report



Pre-work: Create Custom Fields



Standard reports do not report on Yes & No values to score and track accuracy. To report on the results users must create a custom field for each checklist question with a prompt on how to respond.

Example Time documented? (Y-1, N-0, N/A-blank)

Navigate to custom field library:

(Enterprise) Go to Admin > Manage Audit Settings > Custom Fields > Add New Field

(Consulting) Go to Admin > Manage Settings > Custom Fields *(available for all sub-clients)*

(Consulting) Go to Client > select Client > Client Settings > Custom Fields *(available for this sub-client only)*

Checklist Results Extract Report



Step 1: Create the custom field.

Enter field name & into which section of Audit Box to place field.

Step 2: Activate custom field

Go to Audit Guidelines > edit a current guideline or create a new one specific to this checklist. Scroll to bottom of guideline. Move fields (in order you want them to appear) from left panel to right.

Step 3: Perform Audit

Auditor enters 1 or 0 for all questions for all charts.

Step 4: Pull report & calculate results

The screenshot shows two overlapping windows from a software application. The top window is titled "Edit Field" and contains two text input fields. The first field is labeled "Field Name:*" and contains the text "accounting of research funds (yes= 1, no= 0)". The second field is labeled "Section :*" and contains the text "Patient Data". A blue "Submit" button is located at the bottom right of this window. The bottom window is titled "Custom Fields to Include" and features two scrollable lists of field names. The left list includes: "Additional New Problem to examiner", "Advanced Practitioner", "Balance Due", "Billing Provider", "Billing Provider Specialty", "CAP Agency Specific Requirements, M", "change of investigator reported to etf", "Code Billed", "Coder Comments", "Coder CPT Results", and "Coder Dx Result". The right list includes: "accounting of research funds (yes= 1, no= 1)", "accurate inventory count (yes= 1, no= 0)", "annual safety report (yes= 1, no= 0)", "defined document retention policy (ye", "end of study letter (yes= 1, no= 0)", "protocol amendments (yes= 1, no= 0)", "structure and content of investigator", and "temperature log (yes= 1, no= 0)". Between the two lists are four blue buttons with white arrows: a double right arrow, a single right arrow, a single left arrow, and a double left arrow, used for moving items between the lists.



06

**Code-Level Financial (Refund/Rebill)
Extract Report**

Code-Level Financial (Refund/Rebill) Extract Report



Select the fields to include in the report

- ❖ **Provider/coder Fields:** Provider Last & First, Practice, Specialty, Project, Auditor, and Completed Date
- ❖ **Patient Data Fields:** Patient Name, Patient ID, POS, DOS, Payer
- ❖ **ICD/EM/CPT/HCPCS Fields:** Reported CPT, Reported Modifier, Audited CPT, Audited Modifier
- ❖ **Statistics Fields:** Value of Reported Total \$, Value of Audited Total \$, Variance of \$

Project	Practice	Provider First Name	Provider Last Name	Patient Name	Date of Service	Auditor	Completed Date	Reported CPT	Value of Reported Total \$	Audited CPT	Value of Audited Total \$	Variance of \$
2024 Annual Provider Audit	AAPC	Mike	Burns	Fleetwood, Tammy	2/21/2015	Jane Doe	3/26/2024	99214	\$78.60	99214	\$78.60	\$0.00
2024 Annual Provider Audit	AAPC	Mike	Burns	Fleetwood, Tammy	2/21/2015	Jane Doe	3/26/2024	11000	\$29.02	11000	\$29.02	\$0.00
2024 Annual Provider Audit	AAPC	Mike	Burns	Smith, William	3/5/2015	Jane Doe	3/26/2024	99215	\$110.00	99214	\$78.50	\$(31.50)
2024 Annual Provider Audit	AAPC	Mike	Burns	Smith, William	4/1/2016	Jane Doe	3/26/2024	99214	\$100.21	99214	\$100.21	\$0.00

Sum of Variance of \$	Refund/Rebill	Refund	Grand Total
Practice	Provider Last Name	Rebill	
⊖ AAPC	Bates	-594.01	199.57
	Billy	-103.81	
	Burns	-157.1	213.04
	Jones	-344.85	434.53
	Law	-119.77	363.06
	Smith	-49.28	206.89
AAPC Total		-1368.82	1417.09
⊖ Downtown	Jordan	-131.17	28.95
	KING		412.2
	Test25	-69.64	296.15
Downtown Total		-200.81	737.3
⊖ Eastside	Dylan	-43.29	117.8
	Florek	-210.9	845.19
	Scott	-164.82	944.68
Eastside Total		-419.01	1907.67
⊖ Southside	BMC Main		409.46
	Brady	-143.96	1872.51
	Gold	-50.2	99.11
Southside Total		-194.16	2381.08
⊖ Westlake Clinic	BMC Main	-555.53	145.96
	Johnson	-485.65	122.47
Westlake Clinic Total		-1041.18	268.43
Grand Total		-3223.98	6711.57



07

**Education Completion Date
Extract Report**

Education Completion Date Extract Report



Two ways to capture education completion date, depending upon your workflow

- ❖ **Custom Field** – use a custom field if auditors hold audit in their My Work Queue until after Education is completed.
 - ❖ Auditors enter date education completed in custom field for one encounter/DOS/chart.
- ❖ **Internal Notes** – use internal notes if auditors close send to reports prior to education
 - ❖ Auditor enters a ‘starter’ internal note in first encounter/DOS/chart > close send to reports
 - ❖ After education has been completed, auditor goes to Audit > Audit Work Queue > clicks on provider/coder name > click on internal note icon > enter completion date

Education Completion Date Extract Report



Using Internal Notes

After education is completed, Educator can add a 2nd internal note from the Audit Work Queue Dashboard, avoiding the need to Request Re-Audit to enter data into a custom field.

Audit Project	Region	Practice	Provider Name	Organization
<input type="checkbox"/> 2024 HCC Risk Adjustment Audit	West	AAPC	Applegate, MD, John	
<input type="checkbox"/> 2023 Family Medicine Audit			Applegate, MD, John	
<input type="checkbox"/> 2023 New Provider Audits			Applegate, MD, John	

Provider: Applegate, MD, John Project: 2023 Family Medicine Audit

Case	Pt ID	Pt Name	Date of Service	Status	Audit Trail	QA Trail	Comment
<input type="checkbox"/> 1	4233298	Lane, Louise	01-15-2023	completed	Hart, Rose 05-10-2023 01:33:49 PM (MDT) Hart, Rose 07-31-2023 12:34:05 PM (MDT) Hart, Rose 04-16-2024 10:56:36 AM (MDT) Hart, Rose 04-16-2024 10:58:32 AM (MDT) Hart, Rose 04-16-2024 10:58:35 AM (MDT)		
<input type="checkbox"/> 2	4233298	Stark, Tony	12-15-2022	completed	Hart, Rose 02-24-2023 08:55:19 AM (MST) Hart, Rose 12-08-2023 07:45:21 AM (MST)		

Internal Note

Comments

Save Cancel

Hart, Rose
07-29-2024 11:12:14 PM (MDT)

8/2/2024

Hart, Rose
07-29-2024 11:08:13 PM (MDT)

Education Needed

3

Education Completion Date Extract Report



Cleaning up Raw Data

Step 1: Delete rows with no internal notes

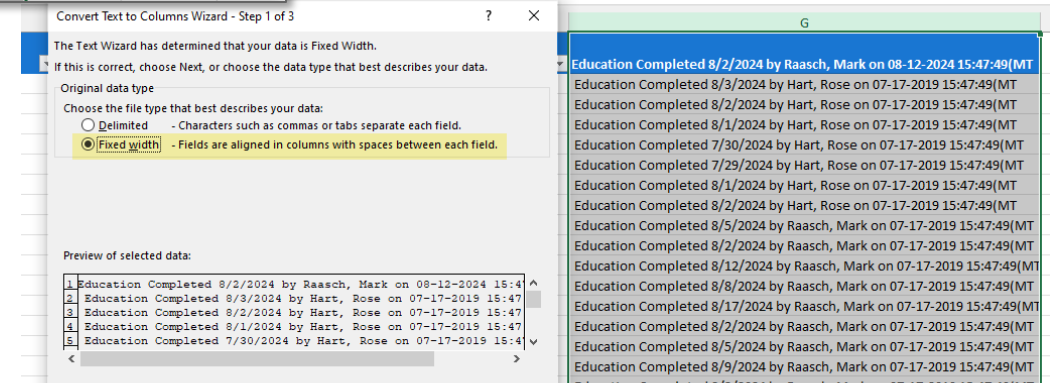
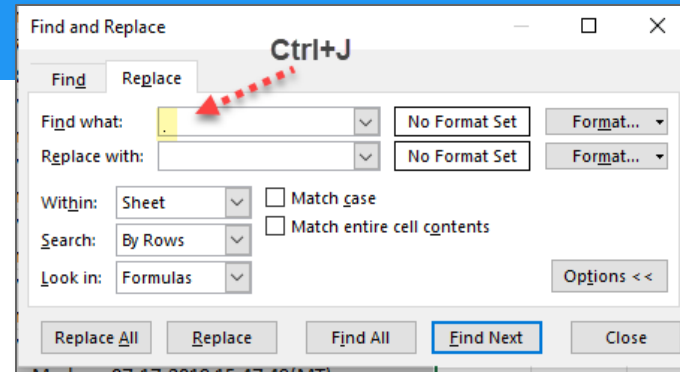
Step 2: Remove Carriage Returns

In the *Find What* field enter Ctrl+J. It will look empty, but you will see a tiny dot. In the *Replace With* field, leave blank > Replace all

Step 3: Split the two sentences using text to columns

Break the sentence on the last character of first sentence)

Step 4: Split last sentence by spaces to isolate the date, then removed unneeded data



Project	Provider First Name	Provider Last Name	Auditor	Completed Date	Internal Notes	Completed
2024 Annual Audit	Stetson	Scott	Hart, Rose	7/17/2024	Education Needed by Hart, Rose on 07-17-2019 15:47:49(MT	8/3/2024
2024 Annual Audit	Taurino	Avelar	Hart, Rose	7/17/2024	Education Needed by Hart, Rose on 07-17-2019 15:47:49(MT	8/2/2024
2024 Annual Audit	MD	Aaron W. Slinker	Hart, Rose	7/17/2024	Education Needed by Hart, Rose on 07-17-2019 15:47:49(MT	8/1/2024
2024 Annual Audit	Henry	Baldwin	Hart, Rose	7/17/2024	Education Needed by Hart, Rose on 07-17-2019 15:47:49(MT	7/30/2024
2024 Annual Audit	Taurino	Avelar	Hart, Rose	7/17/2024	Education Needed by Hart, Rose on 07-17-2019 15:47:49(MT	7/29/2024
2024 Annual Audit	Brad	Dicaprio	Hart, Rose	7/17/2024	Education Needed by Hart, Rose on 07-17-2019 15:47:49(MT	8/1/2024
2024 Annual Audit	EINO	SCHUPPE	Hart, Rose	7/17/2024	Education Needed by Hart, Rose on 07-17-2019 15:47:49(MT	8/2/2024
2024 Annual Audit	Judd	Law	Raasch, Mark	7/17/2024	Education Needed by Raasch, Mark on 07-17-2019 15:47:49(MT	8/5/2024
2024 Annual Audit	Mike	Burns	Raasch, Mark	7/17/2024	Education Needed by Raasch, Mark on 07-17-2019 15:47:49(MT	8/2/2024
2024 Annual Audit	John	Johnson	Raasch, Mark	7/17/2024	Education Needed by Raasch, Mark on 07-17-2019 15:47:49(MT	8/12/2024
2024 Annual Audit	John	Smith	Jones, Kayla	7/17/2024	Education Needed by Raasch, Mark on 07-17-2019 15:47:49(MT	8/8/2024
2024 Annual Audit	Tom	Brady	Raasch, Mark	7/17/2024	Education Needed by Raasch, Mark on 07-17-2019 15:47:49(MT	8/17/2024
2024 Annual Audit	Bob	Dylan	Raasch, Mark	7/17/2024	Education Needed by Raasch, Mark on 07-17-2019 15:47:49(MT	8/2/2024
2024 Annual Audit	Mike	Burns	Raasch, Mark	7/17/2024	Education Needed by Raasch, Mark on 07-17-2019 15:47:49(MT	8/5/2024

Links for Excel Tips



- [Pivot Tables 101](#)
- [Error Tracking and Reporting from Start to Finish](#)
 - [Audit Manager Reports Overview Handout](#)
- [Faster Audit Data Reporting and Error Trending with Audit Manager](#)
 - [Slide Deck](#)
- [Spreadsheet Shortcuts 101](#)
 - [Slide Deck](#)



Premium Reporting

Premium Reporting



- *Customize existing reports*
- Create new reports
- Gain efficiency eliminating manual manipulation
- Combine results from across projects
- Add conditional highlighting to identify specific scores
- Chart findings reports
- Over/Under reports
- Division/Practice reports
- Production reports
- Performance reports of auditor reviews
- Present intuitive data visualizations for improve comprehensive



Q&A